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OMB No 1545-0052

2016

**Return of Private Foundation** 

Department of the Treasury Internal Revenue Service

Form 990-PF

or Section 4947(a)(1) Trust Treated as Private Foundation Do not enter social security numbers on this form as it may be made public.
 Information about Form 990-PF and its instructions is at <a href="www.irs.gov/form990pf">www.irs.gov/form990pf</a>.

Open to Public Inspection

For	caler	ndar year 2016, or tax year beginning 01-01-20	)16 , ar	nd er	nding 12-31-	2016	
		indation ang Foundation			A Employer Ide	entification numbe	<del>-</del>
	e i i cii	ang roundation			38-3383222		
		I street (or P O box number if mail is not delivered to street address) id Street NW	Room/suite		<b>B</b> Telephone nu	mber (see instruction	ns)
		, state or province, country, and ZIP or foreign postal code , DC 20008	1		<b>C</b> If exemption	application is pending	g, check here
G CH	neck all	I that apply Initial return Initial return of a	former public charity		<b>D 1.</b> Foreign or	ganizations, check he	ere $\square$
		Final return Amended return				ganizations meeting	
		Address change Name change			test, chec	k here and attach cor	mputation 🕨 🔲
H Ch	eck ty	pe of organization $\mathbf{\nabla}$ Section 501(c)(3) exempt private	foundation			ındatıon status was t n 507(b)(1)(A), checl	
	Section	4947(a)(1) nonexempt charitable trust  Other taxable	private foundation			. , , , , ,	
of y	year <i>(f</i> .	set value of all assets at end from Part II, col (c), \$ 2,307,767  J Accounting method  Other (specify)  (Part I, column (d) must	□ Cash ☑ Accru	al		ition is in a 60-month n 507(b)(1)(B), checl	
Pa	rt I	Analysis of Revenue and Expenses (The total	(a) Revenue and				(d) Disbursements
		of amounts in columns (b), (c), and (d) may not necessarily	expenses per books	(ь)	Net investment income	(c) Adjusted net income	for charitable purposes
		equal the amounts in column (a) (see instructions) )					(cash basis only)
	1	Contributions, gifts, grants, etc , received (attach schedule)	749,634				
	2	Check ▶ ☐ If the foundation is <b>not</b> required to attach					
Reverkie		Sch B					
	3	Interest on savings and temporary cash investments	1,406		1,406	1,406	
	4	Dividends and interest from securities	75,742		75,742	75,742	
	5a b	Net rental income or (loss)					
	6a	Net gain or (loss) from sale of assets not on line 10	-45,056				
	ь	Gross sales price for all assets on line 6a	,				
eve		339,272					
~	7	Capital gain net income (from Part IV, line 2)					
	8	Net short-term capital gain					
	9	Income modifications					
	10a b	Gross sales less returns and allowances Less Cost of goods sold	<u> </u>				
	c	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	781,726		77,148	77,148	
	13	Compensation of officers, directors, trustees, etc	111,397		•	,	111,397
	14	Other employee salaries and wages	40,481				40,481
Š	15	Pension plans, employee benefits					
156	16a	Legal fees (attach schedule)					
<u>8</u>	ь	Accounting fees (attach schedule)	<b>%</b> 23,750				23,750
e E	С	Other professional fees (attach schedule)	<b>9</b> 45,579				45,579
Ĕ	17	Interest					
stra	18	Taxes (attach schedule) (see instructions)	12,310				12,310
id Administrative Expenses	19	Depreciation (attach schedule) and depletion	1,309				
	20	Occupancy	27,229				27,229
	21	Travel, conferences, and meetings	144,033				144,033
a	22	Printing and publications					
<u> Fil</u>	23	Other expenses (attach schedule)	177,239				177,239
er at	24	Total operating and administrative expenses.			_		
<u>a</u>	25	Add lines 13 through 23	583,327		0		582,018 51,145
_	25	Contributions, gifts, grants paid	51,145				51,145
	26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	634,472		0		633,163
	27	Subtract line 26 from line 12	147 054				
	а	Excess of revenue over expenses and disbursements	147,254				
	b	Net investment income (if negative, enter -0-)			77,148		
	С	Adjusted net income(If negative, enter -0-)				77,148	
or	Paper	work Reduction Act Notice, see instructions.		(	Cat No 11289	For	m <b>990-PF</b> (2016)

839,888

1,397

1,608,277

40,792

40,792

1.340.515

1,567,485

1,608,277

226.970

238,177

874,935

783,954

6,615

1,768,553

53,814

53,814

1.433.409

1,714,739

1,768,553

1

2

3

4

5

6

1,567,485

1,714,739

1,714,739 Form **990-PF** (2016)

147,254

281,330

1,586,613

611,490

6,615

2,307,767

Investments—U S and state government obligations (attach schedule)

Investments—corporate stock (attach schedule) . . . . . . . .

Accounts payable and accrued expenses . . . . . . . . . . . .

Loans from officers, directors, trustees, and other disqualified persons

Mortgages and other notes payable (attach schedule). . . . . .

Total liabilities(add lines 17 through 22) . . . . . . . . . . . .

Investments—land, buildings, and equipment basis ▶ \_

Investments—other (attach schedule) . . . . . . .

Less accumulated depreciation (attach schedule) ▶ 12,654

Less accumulated depreciation (attach schedule)

Total assets (to be completed by all filers—see the

Foundations that follow SFAS 117, check here ▶

and complete lines 24 through 26 and lines 30 and 31.

Foundations that do not follow SFAS 117, check here ▶

Paid-in or capital surplus, or land, bldg, and equipment fund

Retained earnings, accumulated income, endowment, or other funds

Total net assets or fund balances (see instructions) . . . . .

Total liabilities and net assets/fund balances (see instructions) .

Total net assets or fund balances at beginning of year-Part II, column (a), line 30 (must agree with end-

Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30

Analysis of Changes in Net Assets or Fund Balances

Land, buildings, and equipment basis ▶ \_

instructions Also, see page 1, item I)

Other assets (describe > \_

Other liabilities (describe -

Unrestricted

Temporarily restricted

Permanently restricted .

and complete lines 27 through 31.

of-year figure reported on prior year's return)

Decreases not included in line 2 (itemize) ▶

Other increases not included in line 2 (itemize) ▶ \_\_\_\_

Enter amount from Part I, line 27a

10a

11

12

13

14

15 16

17

18

19

20 21

22

23

24

25

28 29

31

Part III

2

3

Liabilities

Balances

Fund 26

ō

Assets 27

Net 30

b C

- Capital Callio			(b)		
	<b>(a)</b> the kınd(s) of property sold (e g , re ehouse, or common stock, 200 shs	How acquired P—Purchase D—Donation	Date acquir		
<b>1a</b> See Additional Data Tabl	e				
b					
С					
d					
e					
(e) Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	Cost or d	<b>g)</b> other basis ense of sale		(h) iain or (loss) lus (f) minus (g)
a See Addıtıonal Data Tabl	e				
b					
С					
d					
е					
Complete only for assets	s showing gain in column (h) and ow	ned by the foundation o	n 12/31/69		(I)
(i) F M V as of 12/31/69	(j) Adjusted basis	Excess	k) of col (ı)	col (k), bu	Col (h) gain minus t not less than -0-) <b>or</b>
	as of 12/31/69	over col	(j), if any	Losse	es (from col (h))
a See Additional Data Tabl	e				
b					
d					
<u>e</u>		If gain, also enter in Pa			
·	gain or (loss) as defined in sections :	, , , , ,	·	} 2	-45,056 -173
Part V Qualification l	Under Section 4940(e) for Re	educed Tax on Net	Investment	Income	
(For optional use by domestic p	private foundations subject to the sec	ction 4940(a) tax on nel	t investment ind	come )	
If section 4940(d)(2) applies, le	eave this part blank			_	
If "Yes," the foundation does no	ne section 4942 tax on the distributa ot qualify under section 4940(e) Do	not complete this part	·		」Yes □ No
	nount in each column for each year,	see instructions before	making any en		
(a) Base period years Calendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	(c) Net value of noncharitable	e-use assets	( <b>d</b> ) Distribution (col (b) divide	on ratio
2015	583,300		1,494,704		0 390244
2014	547,843		1,741,728		0 31454
2013	779,504		1,678,272		0 464468
2012	852,860		1,222,989		0 697357
2011	809,707		1,227,180		0 659811
2 Total of line 1, column (	,			2	2 526421
number of years the four	o for the 5-year base period—divide ndation has been in existence if less incharitable-use assets for 2016 fron	than 5 years		3 4	<u>0 505284</u> 2,042,244
<b>5</b> Multiply line 4 by line 3		•	<del></del>	5	1,031,913
	ent income (1% of Part I, line 27b)		· · · · · · · · · · · · · · · · · · ·	6	771
			· · · · · · · -	7	1,032,684
	ions from Part XII, line 4 ,		· · · · · · -	8	633,163
	eater than line 7, check the box in Pa		· · · · · <u> </u>	_	
					Form <b>QQ0-PF</b> (2016)

Form 990-PF	2016)		Page <b>7</b>
Part VIII	Information About Officers, Directors, Trust and Contractors (continued)	ees, Foundation Managers, Highly Paid E	imployees,
3 Five hi	phest-paid independent contractors for professional s	services (see instructions). If none, enter "NO	NE".
(a) Nam	e and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			
<b>Total</b> number	of others receiving over \$50,000 for professional services.		
Part IX-A	Summary of Direct Charitable Activities		
	on's four largest direct charitable activities during the tax year Incluid other beneficiaries served, conferences convened, research papers		Expenses
1 DRL Gran	ts - See attached explanation at Schedule O		193,455
2 FORD CPS	Elections - See attached explanation at Schedule O		92,938
	D - See attached explanation at Schedule O		45,323
	2016 Data Journalism - See attached explanation at Sched		49,894
Part IX-B	, ,	<u>,                                    </u>	T
	two largest program-related investments made by the foundation du	uring the tax year on lines 1 and 2	Amount
1			-
			-
2			
-			1
All other p	ogram-related investments See instructions		
3			
			_
Total, Add lin	es 1 through 3		,
			Form <b>990-PF</b> (2016)

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

1a

1b

2

За 3b

4

5

633,163

633.163

633,163

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Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes

Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Adjusted qualifying distributions. Subtract line 5 from line 4. . . . . . . . . .

Amounts set aside for specific charitable projects that satisfy the

the section 4940(e) reduction of tax in those years

Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . . . . . . . . .

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

1

2

3

4

Page 9

100.569

100.569

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Part XIII	ľ

Form 990-PF (20	016)	
Part XIII	Undistributed Income (see instruc	tions)

**b** Total for prior years

From 2011. . . . .

**b** From 2012. . . . . c From 2013. . .

**d** From 2014. . . . .

e From 2015. . . . .

XII, line 4 > \$

indicated below:

1 Distributable amount for 2016 from Part XI, line 7

f Total of lines 3a through e. . . . . . .

d Applied to 2016 distributable amount. . . . . e Remaining amount distributed out of corpus

same amount must be shown in column (a) )

**5** Excess distributions carryover applied to 2016 (If an amount appears in column (d), the

a Corpus Add lines 3f, 4c, and 4e Subtract line 5

applied on line 5 or line 7 (see instructions) . . .

Subtract lines 7 and 8 from line 6a . . . . . .

9 Excess distributions carryover to 2017.

10 Analysis of line 9

a Excess from 2012. . .

c Excess from 2014. . . .

d Excess from 2015. . .

e Excess from 2016. . .

**b** Excess from 2013. .

6 Enter the net total of each column as

**b** Prior years' undistributed income Subtract line 4b from line 2b . . . . . . . . . c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . . . d Subtract line 6c from line 6b Taxable amount —see instructions . . . . . . . . . . . . . e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . . . . f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017 . . . . . . 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) . . . . . . . . . 8 Excess distributions carryover from 2011 not

4 Qualifying distributions for 2016 from Part

a Applied to 2015, but not more than line 2a **b** Applied to undistributed income of prior years (Election required—see instructions). . . . . c Treated as distributions out of corpus (Election required—see instructions). . . . . . . . . .

- 2 Undistributed income, if any, as of the end of 2016 a Enter amount for 2015 only. . . . . . .

  - Excess distributions carryover, if any, to 2016 749,162
    - 793,368
    - 700.269
    - 465,943
      - - 510,496

(a)

Corpus

3,219,238

532.594

3,751,832

749,162

3,002,670

793.368 700,269

465.943

510,496

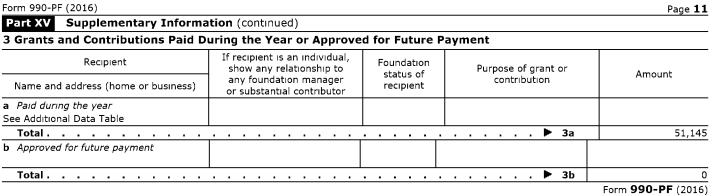
532.594

(b)

Years prior to 2015

(c)

orr	m 990-PF (2016)					Page <b>10</b>
;	Part XIV Private Operating Found	ations (see instr	uctions and Part \	VII-A, question 9)	ı	
	If the foundation has received a ruling or de foundation, and the ruling is effective for 20	116, enter the date of	of the ruling	▶∟_		
	Check box to indicate whether the organizat	ion is a private oper	ating foundation des	scribed in section L	∟ 4942(ر)(3) or ∟	4942(j)(5)
2a	Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		(e) Total
	investment return from Part X for each year listed	(a) 2016	<b>(b)</b> 2015	(c) 2014	(d) 2013	
b	85% of line 2a					
	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
	Complete 3a, b, or c for the alternative test relied upon					
а	"Assets" alternative test—enter					
	(1) Value of all assets					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c	"Support" alternative test—enter					
·	(1) Total support other than gross investment income (interest,					
	dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in					
	section 4942(j)(3)(B)(III) (3) Largest amount of support					
	from an exempt organization (4) Gross investment income					
	Supplementary Information	(Complete this	part only if the	organization ha	d \$5.000 or more	e in
Pa	assets at any time during th				4-,	
1 a	Information Regarding Foundation Man List any managers of the foundation who have before the close of any tax year (but only if	e contributed more				ı
	Julia Chang Bloch	·		, ,		
b	List any managers of the foundation who ow ownership of a partnership or other entity)				large portion of the	
	None					
<b>▲</b>						<u> </u>
2	Information Regarding Contribution, Gr	ant, Gift, Loan, Sc	holarship, etc., Pr	ograms:		
	Check here ► ☑ If the foundation only mak unsolicited requests for funds If the founda other conditions, complete items 2a, b, c, a	tion makes gifts, gr	preselected charitab ants, etc (see instri	ole organizations and uctions) to individua	l does not accept Is or organizations un	der
а	The name, address, and telephone number	or email address of	the person to whom	applications should	be addressed	
ь	The form in which applications should be sul	bmitted and informa	ation and materials t	they should include		
	Any submission deadlines					
C	Any auditionion dedulines					
d	Any restrictions or limitations on awards, su factors	ch as by geographic	al areas, charitable	fields, kinds of instit	tutions, or other	



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Part XVI-A Analysis of Income-Producing	Activities				
Enter gross amounts unless otherwise indicated	Unrelated b	usiness income	Excluded by section	n 512, 513, or 514	(e) Related or exempt
1 Program service revenue	(a) Business code	<b>(b)</b> Amount	(c) Exclusion code	( <b>d)</b> Amount	function income (See instructions )
a					
b					
c					
e					
f					
g Fees and contracts from government agencies					
<ul> <li>2 Membership dues and assessments.</li> <li>3 Interest on savings and temporary cash investments</li> </ul>			14	146	
4 Dividends and interest from securities			14	77,002	
5 Net rental income or (loss) from real estate				•	
a Debt-financed property					
<b>b</b> Not debt-financed property					
<b>6</b> Net rental income or (loss) from personal property					
7 Other investment income					
<b>8</b> Gain or (loss) from sales of assets other than inventory					-45,056
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				77,148	-45,056
<b>13 Total.</b> Add line 12, columns (b), (d), and (e)			1	3	32,092
(See worksheet in line 13 instructions to verify calculation		h	nt Duumaaaa		
Part XVI-B Relationship of Activities to the Line No. Explain below how each activity for which the accomplishment of the foundation's explain the accomplishment of the foundation of the foundation.	ıncome ıs report	ed in column (e) o	of Part XVI-A contribi		
instructions )	empt purposes	(other than by pro	viding funds for such	(Jee	
				E_	rm <b>990-PF</b> (2016)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

Part XVII	Exempt Organiz	ations						•				
1 Did the org	janization directly or ind Code (other than section	lirectly engag n 501(c)(3) o	ge in any rganizat	y of the tions) o	following with ar r in section 527, i	y other o	rganızatıcı political	in described in sect organizations?	ion 501		Yes	No
	rom the reporting found								F			
(1) Cash.									. [	1a(1)		No
(2) Other assets									[	1a(2)		No
<b>b</b> Other trans	sactions											
	of assets to a noncharit		-							1b(1)		No
(2) Purch	ases of assets from a no	oncharitable (	exempt	organız	ation					1b(2)		No
(3) Rental of facilities, equipment, or other assets									1b(3)		No	
(4) Reimbursement arrangements								1b(4)		No		
(5) Loans or loan guarantees								1b(5)		No		
· · · · · · · · · · · · · · · · · · ·									1b(6)		No	
_	facilities, equipment, m	-								1c		No
	ver to any of the above i ds, other assets, or serv											
	saction or sharing arran											
						(1) 5						
(a) Line No	(b) Amount involved	(c) Name of r	noncharita	able exer	mpt organization	(a) Des	scription of	transfers, transactions	s, and shari	ng arra	ngemen	ts
												-
2a Is the foun	dation directly or indirec	ctly affiliated	with, o	r relate	d to, one or more	tax-exen	npt organi	zations		_	_	
described i	n section 501(c) of the	Code (other	than sec	ction 50	1(c)(3)) or in sec	tion 527?			$\sqsubset$	Yes	<b>✓</b> N	0
<b>b</b> If "Yes," co	mplete the following scl											
	(a) Name of organization	1		( b	) Type of organizati	on		(c) Description	n of relatior	nship		
			_									
			-+									
Unde	r penalties of perjury, I	declare that	I have	examın	ed this return, inc	luding ac	companyı	ng schedules and s	tatements	s, and	to the	best
of my	y knowledge and belief,	ıt ıs true, co										
31911	n preparer has any knov	wledge		1								
Here 👠 🌁	****				2017-05-12	\ *	****		May the IR with the pr			
	Signature of officer or tru	ustee			Date	T	itle		(see instr )	🤈 🗹 Y	es 🗆 N	10
	Print/Type preparer's	name	Prepare	er's Sign	nature	Date		Check if self-	PTIN			
								employed ▶ □	F	00070	812	
Paid	Nancy Bechanan						'-08-04	Cimpioyed P				
Preparer												
Use Only	Firm's name ► Becha	anan & Comp	any LLC	2					Firm's EI	N ▶52·	12243	305
USE UIIIY	Firm's address ▶ 222	226 Creekvie	w Drive									
									Phone no	(301	869-	3747
	Gaithersburg, MD 20882								,501	,	/	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d							
	List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co )				(d) Date sold (mo , day, yr )		
Janus Alpha Global Real Estat	e		Р	2013-07-08	2016-11-21		
Lord Abbett Short Duration In	c Fund		Р	2016-09-07	2016-11-02		
Mainstay Short Duration High	Yield		Р	2015-05-29	2016-11-21		
Potash Corp Sask Inc			Р	2015-12-16	2016-11-21		
Vaneck Vectors ETF			Р	2015-03-25	2016-11-18		
EPR Properties			Р	2016-09-28	2016-10-07		
Fifth Third Bancrp			Р	2016-09-28	2016-10-07		
Goldman Sachs Group			Р	2016-09-28	2016-10-07		
PS Business Parks			Р	2016-09-28	2016-10-07		
SCE Trust V Cuml Ser K			Р	2016-09-28	2016-10-07		
Form 990PF Part IV - Capital	Gains and Losses for Tax on	Investment I	ncome - Colum	ns e - h			
(e) Gross sales price	Depreciation allowed (f) (or allowable)		r other basıs pense of sale	Gain <b>(h)</b> (e) plus	or (loss) (f) mınus (g)		
153,121			183,141		-30,020		
103,000			103,522	-5:			
2,194			2,209	-15			
19,685			19,359	326			
40,994			55,842	-14,848			
783			783				
4,667			4,667				
2,565			2,520		45		
3,975			3,976		-1		
1,534			1,534				
Form 990PF Part IV - Capital	Gains and Losses for Tax on	Investment I	ncome - Colum	ns i - I			
Complete only for assets show	ring gain in column (h) and owned b	y the foundation	on 12/31/69		(h) gain minus		
(i) F M V as of 12/31/69	Adjusted basis <b>(j)</b> as of 12/31/69		ss of col(ı) ol(ʒ), ıf any		t less than -0-) <b>or</b> rom col (h))		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d								
	List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co )				(d) Date sold (mo , day, yr )			
Zions Bancorp Dep Ser		Р	2016-09-28	2016-10-07				
Affiliated Managers Group			Р	2016-09-27	2016-11-15			
Allstate Corp Ser E			Р	2016-09-27	2016-11-15			
Digital Realty Trust			Р	2016-09-27	2016-11-15			
GMAC Capital Trust			Р	2016-09-27	2016-11-15			
ING Groep N V			Р	2016-09-27	2016-11-15			
PS Business Parks			Р	2016-09-28	2016-11-15			
Raymond James Financial			Р	2016-11-01	2016-11-15			
Telephone & Data Systems			Р	2016-09-27	2016-11-15			
US Bancorp Del Ser			Р	2016-10-13	2016-11-15			
Form 990PF Part IV - Capital	Gains and Losses for Tax on	Investment I	ncome - Colum	ns e - h				
(e) Gross sales price	Depreciation allowed <b>(f)</b> (or allowable)		r other basis pense of sale	Gain or (loss) (h) (e) plus (f) minus (g)				
4,708			4,709		-1			
101			105		-4			
79			79					
109			111	-2				
533			533					
101			103	-2				
49			52	-3				
128			128					
74			78		-4			
282			282					
Form 990PF Part IV - Capital	Gains and Losses for Tax on	Investment I	ncome - Colum	ns i - I				
Complete only for assets show	ring gain in column (h) and owned b	y the foundation	on 12/31/69		(h) gain minus			
(i) F M V as of 12/31/69	Adjusted basis <b>(j)</b> as of 12/31/69		ss of col(ı) ol(ʒ), ıf any		t less than -0-) <b>or</b> rom col (h))			

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d List and describe the kind(s) of property sold (e.g., real estate, (d) (b) (c) (a) 2-story brick warehouse, or common stock, 200 shs MLC Co ) How acquired Date acquired Date sold P-Purchase (mo, day, yr) (mo, day, yr) D-Donation Wells Fargo & Co Ρ 2016-09-27 2016-11-15 National Retail Properties Ρ 2016-10-10 2016-12-01 Royal Bank of Scotland Ρ 2016-10-11 2016-12-02 Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h (e) Gross sales price Cost or other basis Gain or (loss) Depreciation allowed (or allowable) (q) plus expense of sale (h) (e) plus (f) minus (g) (f) 189 189 150 154 -4 251 252 -1 Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - I Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 Gains (Col (h) gain minus col (k), but not less than -0-) or (i) F M V as of 12/31/69 Adjusted basis Excess of col (1) **(I)** Losses (from col (h)) (j) as of 12/31/69 (k) over col (1), if any

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation (a) Name and address Title, and average (c) Compensation (If (d) Expense account, (e) other allowances hours per week not paid, enter Contributions to (b) devoted to position -0-) employee benefit plans and deferred compensation

			· · · · · · · · · · · · · · · · · · ·	1
Julia Chang Bloch	President	0	0	0
1743 22nd Street NW Washington, DC 20008	1 40 00			
Samuel Chang	Vice President	0	0	n

Washington, DC 20008				
Samuel Chang	Vice President	0	0	0
1743 22nd Street NW Washington, DC 20008	1 00			

1743 22nd Street NW Washington, DC 20008	1 00			
Rhonda Chang	Vice President	0	0	0
1743 22nd Street NW Washington, DC 20008	1 00			

Rhonda Chang	Vice President	0	0	0
1743 22nd Street NW Washington, DC 20008	1 00			
Stuart M Bloch	Treasurer	0	0	0
1743 22nd Street NW	2 00			

Laurie S Size	Canada m.			
1743 22nd Street NW Washington, DC 20008	2 00			
Stuart M Bloch	Treasurer	0	0	0
Washington, DC 20008				

1743 22nd Street NW Washington, DC 20008	2 00			
Laurie S Size	Secretary	0	0	0
1743 22nd Street NW	2 00			

Washington, DC 20008				
Laurie S Size	Secretary	0	0	
1743 22nd Street NW	2 00			

Laurie S Size	Secretary	0	0	0
1743 22nd Street NW Washington, DC 20008	2 00			

1743 22nd Street NW Washington, DC 20008	2 00			
Dale Fuller	Vice President	0	0	

0 10

1743 22nd Street NW Washington, DC 20008

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to contribution status of

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
Yunnan University Cui Hubei Road Kumming, Yunnan 650091	None		Program support	13,0

a Paid during the year			
Yunnan University Cui Hubei Road Kumming, Yunnan 650091 CH	None	Program support	13,000
Shandong University	None	Program support	8,125

=			
Shandong University 27 South Shanda Road Jinan China CH	None	Program support	8,125
Council of American Ambassadors	Chang direc on board	Program support	4,500

Shandong University 27 South Shanda Road Jinan China CH	None	Program support	8,125
Council of American Ambassadors 888 17th Street NW Washington, DC 20006	Chang direc on board	Program support	4,500
	i l		

СН			
Council of American Ambassadors 888 17th Street NW Washington, DC 20006	Chang direc on board	Program support	4,500
Foreign Policy Association 470 Partk Avenue S New York, NY 10016	None	Program support	250

Th - F			1 000
Foreign Policy Association 470 Partk Avenue S New York, NY 10016	None	Program support	250
Washington, DC 20006			

Washington, DC 20009

Total .

За

Foreign Policy Association 470 Partk Avenue S New York, NY 10016	None	Program support	250
The Fund for American Studies	None	Program support	1 000

Foreign Policy Association 470 Partk Avenue S New York, NY 10016	None	Program support	250
The Fund for American Studies 1706 New Hampshire Ave NW	None	Program support	1,000

51,145

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to contribution status of any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year Fisenhower Institute None Program support 2,500

275

200

250

100

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

818 Connecticut Ave NW Washington, DC 20006	None	Trogram support	
Association for Diplomatic Studies 4000 Arlington Blvd	None	Program support	

4000 Arlington Blvd Arlington, VA 22204			
Sister Cities International 915 15th Street NW Washington, DC 20005	None	Program support	

Sister Cities International 915 15th Street NW Washington, DC 20005	None	Program support	
National Committee on US China Rela	None	Program support	

National Committee on US China Rela 6 East 43rd St 24th floor New York, NY 10017	None	Program support	
D 0 1 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		l <b>_</b>	i

DCICC 1529 16th Street NW	None	Program support	
National Committee on US China Rela 6 East 43rd St 24th floor New York, NY 10017	None	Program support	

3a

6 East 43rd St 24th floor New York, NY 10017	None	rrogram support	
DCJCC 1529 16th Street NW	None	Program support	

ew York, NY 10017			
CJCC 1529 16th Street NW ashington, DC 20036	None	Program support	

DCJCC 1529 16th Street NW Washington, DC 20036	None	Program support	:
Total		 	51.145

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to contribution status of any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year USAID Alumni Association None Program support 75 1901 F Street NW Washington, DC 20006 Sichuan University 3,750 None Program support 17 Renmin South Rd 3rd Section Sichuan Sheng, Wuhou Qu Chengdu 610000 CH 6,870 Tsinghua University 30Shuangging Road None Program support Bejing Shi, Haidian Qu BFSU Alumni Assoc of North America None Program support 10.000 2 North Xisanhuan Road Beiing PR 100089 CH 250 American University None Program support

4801 Massachusetts Ave NW

За

Washington, DC 20016

51,145 Total . .

efile GRAPHIC print - DO NOT P	ROCESS As Filed D	ata -	DL	N: 93491216000057
TY 2016 Accounting Fe	es Schedule			
	Name: The FY C	hang Foundation		
	<b>EIN:</b> 38-33832	222		
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Category  Bechanan & Company	<b>Amount</b>	Income	•	for Charitable

# **TY 2016 Depreciation Schedule**

efile GRAPHIC print - DO NOT PROCESS | As Filed Data -

Name: The FY Chang Foundation

		<b>EIN:</b> 3	8-3383222						
Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Bernice Steinbaum Gallery	2003-12-30	5,400	5,400	SL	10	0	0	0	
Telephone equipment	2009-04-30	3,270	3,270	SL	5	0	0	0	
IBM Thinkpad	2005-05-03	3,083	3,083	SL	5	0	0	0	
Canon Color Laser Printer	2012-07-18	1,140	779	SL	5	228	0	0	
Laptop	2012-02-18	1,174	900	SL	5	234	0	0	
Lenovo computers and monitors	2013-02-27	1,758	996	SL	5	352	0	0	
Lenovo computer	2016-07-21	4,534	0	SL	5	378	0	0	
Laptop	2016-09-21	1,993	0	SL	5	117	0	0	

DLN: 93491216000057

### **TY 2016 General Explanation Attachment**

Name: The FY Chang Foundation

**EIN:** 38-3383222

General E	xplanation	Attachment	
Identifier	Return Reference	Explanation	
1		Form 990PF- General Explanation Attachment 1	Part IX-A DRL GrantsDRL Grants - Grants provided to (1) Organize and carry out the Fulbright Conference on 30 Years of Sino-US Relations Looking forward at the Central Party School in Bejing, (2) Establish a Media Education Consortium to connect top journalism schools and enable them to leverage resources to enrich curricula and exchange ideas and (3) Build support for religious pluralism and freedom among Chinese scholars, equipping them to be voices for change in support of religious freedom, and building an institutional framework in support of religious freedom

| Identifier | Return | Explanation | Reference | Reference |

2	Form 990PF-General	Part IX-A Ford CPS Elections This program is used to support a delegation from the China
	Explanation Attachment	Central Party School to visit the United States to learn about the 2016 Presidential
	2	election process and its implications for United States - China relations

| Identifier | Return | Explanation | Reference | Part IX-A Embassy 2016 Data JournalismTo promote accountable and transparent

_		i antotit = mado j = o to = and o o antonio promoto a o o o antonio anto a manoparo in
	General Explanation	governance by supporting current and next generation Chinese journalists and media
	Attachment 3	practitioners to use open data and apply new digital tools to report the news, enabling
		citizens to access accurate and relevant information that will help them exercise their rights
.		and demands for accountability and transparency

| Identifier | Return | Explanation | Reference | Reference |

4	Form 990PF-General	Part IX-A CLAS FORDThe Chinese Leaders in American Studies (CLAS) program aims to
	Explanation Attachment	nurture the next generation of Chinese academics in American Studies to imrpove the
	4	depth and sophistication of their teaching and study of the United States

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491216000057							
TY 2016 Investments Corporate Bonds Schedule									
Name: 7	The FY Chang Fou	ındatıon							

282,596

303,494

<b>EIN:</b> 38-3383222		
Name of Bond	End of Year Book Value	End of Year Fair Market Value
Fixed income mutual funds	480.460	328.894

Bonds

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491216000057					
TY 2016 Investments Corporate Stock Schedule							
Name:	Γhe FY Chang Fo	oundation					

273,677

240,215

	<b>EIN:</b> 38-3383222		
	Name of Stock	End of Year Book Value	End of Year Fair Market Value
Stocks		634,720	1,312,936

Mutual funds

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		DLN:	93491216000057			
TY 2016 Other Expenses Schedule							
Name:	The FY Chang F	oundation					
EIN:	38-3383222						
Other Expenses Schedule							
Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes			
Other direct program costs	113,257	0	0	113,257			
Bank fees	7,242	0	0	7,242			
Dues and subscriptions	16,536	0	0	16,536			

15,523

2,524

12,749

9,408

0

0

Office expenses

Other expenses

Telecommunications

Program development

15,523

2,524

12,749

9,408

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491216000057								
TY 2016 Other Professional Fees Schedule								
	Name: The FY Chang Foundation EIN: 38-3383222							
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes				

43,275

2,304

43,275

2,304

Other consultants

Other professional fees

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491216000057								
TY 2016 Taxes Schedule								
Name: The FY Chang Foundation EIN: 38-3383222								
Category	An	nount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes			
Payroll taxes		12,310	0	0	12,310			

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491216000057						
Schedule B	Schedule of Contributors		OMB No 1545-0047			
(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	m 990, 990-EZ, 90-PF)  tment of the Treasury  Attach to Form 990, 990-EZ, or 990-PF  Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at		2016			
Name of the organizat The FY Chang Foundation		Employer id	lentification number			
	'	38-3383222				
Organization type (che	eck one)					
Filers of:	Section:					
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization					
	4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundate	tion				
	☐ 527 political organization					
Form 990-PF	501(c)(3) exempt private foundation					
	4947(a)(1) nonexempt charitable trust treated as a private foundation					
501(c)(3) taxable private foundation						
•	ation filing Form 990, 990-EZ, or 990-PF that received, during the year, contribution r property) from any one contributor. Complete Parts I and II. See instructions for	_	•			
Special Rules						
under sections a received from a	tion described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 <sup>1</sup> 3% s 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Pany one contributor, during the year, total contributions of the greater of <b>(1)</b> \$5,000 ne 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II	art II, line 13,	16a, or 16b, and that			
during the year,	tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that rece total contributions of more than \$1,000 exclusively for religious, charitable, scient the prevention of cruelty to children or animals. Complete Parts I, II, and III					
during the year, If this box is che purpose Do no	tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that rece contributions <i>exclusively</i> for religious, charitable, etc., purposes, but no such contributions there the total contributions that were received during the year for an exception of the parts unless the <b>General Rule</b> applies to this organization be able, etc., contributions totaling \$5,000 or more during the year	tributions tota exclusively re ecause it rece	lied more than \$1,000 ligious, charitable, etc , eived <i>nonexclusively</i>			
990-EZ, or 990-PF), bu	on that is not covered by the General Rule and/or the Special Rules does not file S t it <b>must</b> answer "No" on Part IV, line 2, of its Form 990, or check the box on line I Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of	H of its				
For Paperwork Reduction for Form 990, 990-EZ, or 9		le B (Form 990	, 990-EZ, or 990-PF) (2016)			

Schedule B (Form 990, 990-EZ, or 990-PF) (2016) Page 2 Name of organization **Employer identification number** The FY Chang Foundation 38-3383222 Part I Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed (d) (a) (c) (b) Type of No. Name, address, and ZIP + 4 Total contributions contribution Person See Additional Data Table **Payroll** Noncash \$ (Complete Part II for noncash contribution) (d) (a) (c) Type of No. Name, address, and ZIP + 4 Total contributions contribution Person **Payroll** Noncash \$ (Complete Part II for noncash contribution) (d) (a) (b) (c) Type of No. Name, address, and ZIP + 4 Total contributions contribution Person **Payroll** Noncash (Complete Part II for noncash contribution) (d) (a) (b) (c) Type of No. Name, address, and ZIP + 4 **Total contributions** contribution Person **Payroll** Noncash (Complete Part II for noncash contribution) (d) (a) (b) (c) Type of **Total contributions** Name, address, and ZIP + 4 No. contribution Person **Payroll** Noncash \$ (Complete Part II for noncash contribution) (d) (a) (b) (c) Type of No. Name, address, and ZIP + 4 Total contributions contribution Person **Payroll** Noncash \$ (Complete Part II for noncash

contribution)

Schedule B (Form 99	0, 990-EZ, or 990-PF) (2016)		Page <b>3</b>
Name of organization The FY Chang Foundati		Employer ident	ification number
The FF Chang Foundact	011	38-33	383222
Part II	Noncash Property		
(a) No.from Part I	(see instructions) Use duplicate copies of Part II if additional space is needed (b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	<del>-</del>	Schedule B (Form	990, 990-EZ, or 990-PF) (2016)

Schedule B (Form	990, 990-EZ, or 990-PF) (2016)		Page <b>4</b>
Name of organizat The FY Chang Found			Employer identification number 38-3383222
than \$1, organiz the year	000 for the year from any one contributor	r. Complete columns (a) thro of exclusively religious, chari ctions.) ▶ \$	d in section 501(c)(7), (8), or (10) that total more ugh <b>(e) and</b> the following line entry. For table, etc., contributions of <b>\$1,000 or less</b> for
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, and	(e) Transfer of gift ZIP 4	Relationship of transferor to transferee
(a)	(b) Durnoso of gift	(c) Use of gift	(d) Description of how gift is hold
No.from Part I	(b) Purpose of gift	(c) ose of gift	(d) Description of how gift is held
	Transferee's name, address, and	(e) Transfer of gift	Relationship of transferor to transferee
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, and	(e) Transfer of gift	Relationship of transferor to transferee
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, and	(e) Transfer of gift	Relationship of transferor to transferee
			Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

### **Additional Data**

#### Software ID:

**Software Version:** 

**EIN:** 38-3383222

Name: The FY Chang Foundation

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person 🗸
<u>1</u>	ULLICO Inc		Payroll 🗌
	1625 Eye Street NW	\$ 25,000	. :
	Washington, DC 20006		Noncash $\square$
			(Complete Part II for nor contribution )
_			Person 🗸
<u>2</u>	Samuel Chang		Payroll
	758 Pacheco Street	\$ 11,500	. :
	San Francisco, CA94116		Noncash $\square$
			(Complete Part II for not contribution )
			Person 🗸
<u>3</u>	Federal Express		Payroll
	3875 Airways Mod H3 Dept 4634	\$ 10,000	
	Memphis, TN38116		Noncash $\square$
			(Complete Part II for noi contribution )
			Person 🗸
<u>4</u>	Prudential		Payroll 🗌
	115 Commonwealth Avenue	\$ 10,000	Nonesch 🗆
	San Francisco, CA94118		Noncash $\square$
	,		(Complete Part II for nor contribution )
			Person 🗸
<u>5</u>	Van Eck Associates Corporation		Payroll 🗌
	335 Madison Avenue	\$ 20,000	·
	New York, NY10017		Noncash $\square$
			(Complete Part II for nor contribution )
			Person 🗸
<u>6</u>	Thomas Fleeter		Payroll 🗍
	909 Montgomery Street	\$ 5,000	·
	San Francisco, CA94133		Noncash $\square$
			(Complete Part II for nor contribution )

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>7</u>	David Bonderman P O Box 158  Woody Creek, CO81656	\$ 10,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>8</u>	Congressional Bank 6500 Rock Spring Drive Suite 300  Bethesda, MD 20817	\$ 12,500	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>9</u>	FORD Foundation 320 East 43rd Street  New York, NY10017	\$ 104,820	Person  Payroll  Noncash  (Complete Part II for noncash contribution )
<u>10</u>	Paolan Lee 11401 Grey Colt Lane  North Potomac, MD 20878	\$ 60,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution )
<u>11</u>	Albright Stonebridge Group 601 13th Street NW 10th floor  Washington, DC 20005	\$ 104,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>12</u>	Consensus Media 6931 Haycock Road Falls Church, VA22043	\$ 19,988	Person  Payroll  Noncash  (Complete Part II for noncash contribution )

orm 990 Schedule B, Part 1 - Contributors (see instructions) use duplicate copies of Part 1 if additional space is needed.			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>13</u>	Philip Morris Inc 6601 W Broad St  Richmond, VA23230	\$ 25,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
14	Accume Partners 5850 Waterloo Road Suite 10 Columbia, MD21045	\$ 25,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>15</u>	Ted and Doris Lee 611 Washington Street Suite 2204 San Francisco, CA94111	\$ 5,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>16</u>	Ernst Young 1101 New York Ave NW Washington, DC20005	\$ 10,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>17</u>	Eisenhower Institute 818 Connecticut Ave Suite 800  Washington, DC 20006	<b>\$ 5,000</b>	Person  Payroll  Noncash  (Complete Part II for noncash contribution)
<u>18</u>	Goldian Group 9906 River View Court Potomac, MD 20854	s 5,000	Person  Payroll  Noncash  (Complete Part II for noncash contribution )

(a) No. Name, address, and ZIP + 4 (c) Total contributions Type of contribution

Person 

Person 

19

Sugar Safer

Susan Safer
2101 Connecticut Avenue NW Suite 72

Washington, DC 20008

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

Payroll 

Noncash 

(Complete Part II for noncash

contribution )

\$ 10,000